**Validation Details**

This validation test covers the preference which allows users with skill confirmation tasks to view the assigned document without having normal permission to access it in ***iPassport***.

The test is designed specifically to display the ability to grant automatic access to documents for which a skilled task has been assigned, regardless of the user’s permissions in the OU where the document resides. A simple Skilled Group is created to demonstrate the feature where it’s most useful.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of ***iPassport***: the preference, *‘Allow users with a skilled task to view authorised controlled documents without explicit permissions’* has been added to reduce the amount of work administrators need to do to ensure all documents in a skilled group are accessible to all its members.

**Pre-requisites:**

Administration access is required for this test. The primary user requires the permissions in the *‘Administration Editor’* and *‘Global Editor (excluding admin)’* roles in two OUs (we’ll call, *‘OU-a’* and *‘OU-b’*) to access the records in this test. A secondary user requires ‘Global Viewer’ access in only one of the two OUs (*‘OU-a’*).

*Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required.*

*Emails are not delivered from the Validation account to prevent confusion with production account emails.*

This process uses an existing **authorised controlled document**. It should reside in the OU where the secondary user lacks permission to view it (*‘OU-b’*).

*PLEASE NOTE: The validation account does not currently have the ability to convert Word (.docx) files to PDF format as all other accounts do. To be able to preview documents on screen, only upload PDF files as the source document in the validation account.*

It is recommended that you check the automatic log out time for the account (this can be obtained from iPassport support) before commencing validation as some steps may require you to be logged in for longer than the 15 minutes’ default period.

There are repetitions in this validation document; these are necessary as there are multiple pathways that can be used to record and obtain information.

All names such as menu items and sub-menu items will be displayed in bold, for example **Noticeboard.**

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | Log into ***iPassport*** as the primary user | - - - - - - |  |  |  |
| **Menu** | Hover over the **Administration** main menu | The sub-menu should appear |  |  |  |
|  | Hover over the **Settings** sub-menu item | The sub-menu item should be highlighted |  |  |  |
|  | Click the **Settings** sub-menu item | The **‘System Preferences’** tab should load |  |  |  |
| **Set OU Preference** | Click the **Organisational Unit Preferences** tab | The **Organisational Unit Preferences** tab should load |  |  |  |
|  | Click the field, **Organisational Unit** | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU where the document for this test resides (*OU-b*) | The selected OU should display in the field |  |  |  |
|  | Click the row, **Document Control** | The Document Control settings for *‘OU-b’* should load |  |  |  |
|  | Scroll down to the **‘Document access controls’** section | The preference, *‘Allow users with a skilled task to view authorised controlled documents without explicit permissions’* should be visible |  |  |  |
|  | Ensure the checkbox next to the preference, *‘Allow users with a skilled task to view authorised controlled documents without explicit permissions’* is unticked | The checkbox should appear unticked |  |  |  |
|  | Scroll down and click **Save** | The screen should return to the **Organisational Unit Preferences** tab |  |  |  |
| **Menu** | Hover over the **Competency** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the plus **[+]** sign next tothe **Skilled Groups** sub-menu item | The sub-menu item should be highlighted |  |  |  |
| **Creating Skilled Groups** | Click the plus **[+]** sign next to the **Skilled Groups** sub-menu item | The **‘New Skilled Group’** tab should open |  |  |  |
|  | Click the **Name** field | The cursor should be visible inside it |  |  |  |
|  | Enter a name for the new skilled group | The name should display in the field |  |  |  |
|  | Click the **Code** field | The cursor should be visible inside it |  |  |  |
|  | Enter a simple code for the new skilled group | The code should display in the field |  |  |  |
|  | Click **Save** | If the name or code have been taken, the system should warn you and prevent you from continuing; once they are unique, the screen should refresh to display the new skilled group record |  |  |  |
|  | Click the **Users** tab | The **Users** tab should load |  |  |  |
|  | Click **(+) Add User** on the right side of the header | A lightbox should open |  |  |  |
|  | Click the word, *‘Filter’* in the multiselect filter titled, **‘Users to send this task to’** | The word, *‘Filter’* should disappear and the cursor should blink in its place |  |  |  |
|  | Start typing the name of the secondary user | The list of users below should reduce to match the search criteria |  |  |  |
|  | Tick the checkbox next to the name of the secondary user when it becomes visible | The checkbox next to the user’s name should appear selected |  |  |  |
|  | Scroll down and click the button, **Create Tasks** | The lightbox should disappear and the selected user should be displayed in the list of users |  |  |  |
|  | Click the **Documents** tab | The **Documents** tab should load |  |  |  |
|  | Click **(+) Add Documents** on the right side of the header | A lightbox should open |  |  |  |
|  | Click the **Organisational Units** field | A dropdown list of OUs available to the user should display |  |  |  |
|  | Select the OU where the document for this test resides and which the user just added can’t access (*OU-b*) | The selected OU should display in the field |  |  |  |
|  | Enter the name of the document intended for this test in the **Search** field or simply locate it in the list below | The intended document should display in the list |  |  |  |
|  | Click the plus sign **(+)** in the Actions column on the row of the intended document | The document should be removed from the list |  |  |  |
|  | Click the **‘Close and Refresh’** button in the top right corner of the lightbox | The lightbox should close and the selected document should appear in the list of documents |  |  |  |
|  | Click **‘Permission Check’** in the header, next to *‘(+) Add Documents’* | A yellow warning triangle should appear next to the document’s name |  |  |  |
|  | Hover over the document’s name | A pop-up message should appear reading, *‘The following users cannot view this document: <secondary user’s name>’* |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
| **Skill Confirmation Task** | Log in as the secondary user, just added to the skilled group above | The secondary user should be logged in |  |  |  |
|  | Click **My Tasks** in the left sidebar | The **My Tasks** sidebar should expand |  |  |  |
|  | Check the **My Tasks** side bar | There should be a *Read* entry for the document in this test |  |  |  |
| TIP: If the user has many tasks listed, the filter below the search field in the ‘My Tasks’ sidebar can be set to filter only *‘Skill Confirmations’*; it normally defaults to *‘All Task Types’*. | | | | | |
|  | Check the details on the **Read** entry | The index and title of the document should be visible |  |  |  |
|  | Click the *Read* item once it’s identified | The screen should refresh and only display the message, *‘Sorry but you do not have the required permissions to access this area. Please contact your local iPassport administrator for further assistance.’* |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log in as the primary user | The primary user should be logged in |  |  |  |
| **Set OU Preference** | Hover over the **Administration** main menu | The sub-menu should appear |  |  |  |
|  | Hover over the **Settings** sub-menu item | The sub-menu item should be highlighted |  |  |  |
|  | Click the **Settings** sub-menu item | The **‘System Preferences’** tab should load |  |  |  |
|  | Click the **Organisational Unit Preferences** tab | The **Organisational Unit Preferences** tab should load |  |  |  |
|  | Click the field, **Organisational Unit** | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU where the document for this test resides (*OU-b*) | The selected OU should display in the field |  |  |  |
|  | Click the row, **Document Control** | The Document Control settings for *‘OU-b’* should load |  |  |  |
|  | Scroll down to the **‘Document access controls’** section | The preference, *‘Allow users with a skilled task to view authorised controlled documents without explicit permissions’* should be visible |  |  |  |
|  | Tick the checkbox next to the preference, *‘Allow users with a skilled task to view authorised controlled documents without explicit permissions’* | The checkbox should appear ticked |  |  |  |
|  | Scroll down and click **Save** | The screen should return to the **Organisational Unit Preferences** tab |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
| **Skill Confirmation Task** | Log in as the secondary user again | The secondary user should be logged in |  |  |  |
|  | Click **My Tasks** in the left sidebar | The **My Tasks** sidebar should expand |  |  |  |
|  | Check the **My Tasks** side bar | There should be a *Read* entry for the document in this test |  |  |  |
|  | Click the *Read* item once it’s identified | The screen should refresh and display the **General** tab of the document for this test |  |  |  |
|  | Check the area just below the grey ribbon with record tabs | There should be a **‘Please read and confirm…’** task item in a light blue box |  |  |  |
|  | Click the **‘Confirm’** button | A lightbox should appear |  |  |  |
|  | Type “*Read and understood”* in the **‘Completed Note’** field | The text should be visible in the field |  |  |  |
|  | Click **‘Complete Task’** | The lightbox should disappear and the task item should have been removed |  |  |  |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 19th August 2021 | Document created |